

# Global Bio-based Oleochemicals Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G81B44D46AE2EN.html>

Date: June 2026

Pages: 149

Price: US\$ 3,480.00 (Single User License)

ID: G81B44D46AE2EN

## Abstracts

According to our (Global Info Research) latest study, the global Bio-based Oleochemicals market size was valued at US\$ 8293 million in 2025 and is forecast to a readjusted size of US\$ 13537 million by 2032 with a CAGR of 7.2% during review period.

Bio-based oleochemicals refer to fatty acids, fatty alcohols, fatty esters, refined glycerine, fatty amines, fatty amides, fatty acid salts, dimer acids, and selected oleochemical-based surfactant intermediates produced from renewable oils and fats such as palm oil, palm kernel oil, coconut oil, rapeseed oil, soybean oil, castor oil, animal fats, tall oil, and waste oils through hydrolysis, transesterification, hydrogenation, fractionation, esterification, amination, and amidation. Key upstream inputs include natural oils and fats, methanol, hydrogen, ammonia, catalysts, separation and purification materials, packaging materials, steam, power, and other utilities; downstream customers mainly include home care and personal care companies, surfactant producers, lubricant and metalworking fluid manufacturers, coatings and inks companies, plastics and rubber additive producers, food ingredient suppliers, pharmaceutical excipient companies, agrochemical auxiliaries producers, and textile auxiliaries manufacturers. On an ex-factory basis, global capacity of bio-based oleochemicals in 2025 is estimated at about 9.85 million tonnes, with sales volume of around 7.18 million tonnes and an average ex-factory price of approximately USD 1,123 per tonne. Commodity products such as fatty acids and glycerine are generally priced at the lower end, while fatty alcohols, specialty esters, fatty amines, bio-based surfactant intermediates, and high-purity food or pharmaceutical grades command higher prices. The overall industry gross margin in 2025 is estimated at about 18%–32%, with integrated producers benefiting from feedstock access, continuous production, and

global customer qualifications, while specialty and high-purity oleochemical suppliers usually achieve stronger margin levels.

The global bio-based oleochemicals market has developed a mature industrial foundation, with a clear regional division of supply. Southeast Asia benefits from palm oil, palm kernel oil, coconut oil, and other oil resources, giving producers strong cost and scale advantages in commodity fatty acids, fatty alcohols, and glycerine. Companies in Europe, Japan, and North America are more focused on high-purity grades, specialty esters, fatty amines, bio-based surfactant intermediates, and higher-value functional materials. China and India play dual roles as both manufacturing bases and demand markets, supported by stable downstream consumption in home care, surfactants, plastics and rubber, lubricants, and industrial auxiliaries. Overall, the industry is moving from basic oil processing toward a dual structure of large-scale commodity production and differentiated specialty development. Future market growth will be driven mainly by green consumption, low-carbon manufacturing, and downstream formulation upgrades. Home care and personal care companies are increasing the use of renewable raw materials, while detergents, skin care products, cleaning products, and industrial cleaners are creating stronger demand for natural-origin surfactants and oleochemical intermediates. Lubricants, coatings, inks, plastics processing, food, and pharmaceutical excipients are also supporting bio-based substitution, especially for products with high purity, low odor, low impurities, traceable feedstock, and sustainability certification. As downstream customers place greater emphasis on carbon footprint, feedstock origin, and supply chain transparency, producers with feedstock control, continuous production, refining capability, and global customer qualifications will be better positioned to secure long-term business. The main drivers of the industry include policy support, brand owners' decarbonization commitments, consumer preference for sustainable products, and substitution demand against petrochemical routes. Europe and North America are pushing suppliers to strengthen certification systems and traceability due to stricter requirements on sustainable sourcing, bio-based content, and supply chain compliance. Asian markets are supported by the expansion of home care, personal care, industrial auxiliaries, food, and pharmaceutical manufacturing, creating solid demand fundamentals. At the same time, producers are improving profitability through process optimization, energy-saving upgrades, feedstock diversification, and the development of specialty derivatives. Future competition will not depend only on capacity scale, but also on feedstock stability, product purity, customer qualification, formulation adaptability, and low-carbon attributes. The industry still faces several constraints and uncertainties, including natural oil price volatility, sustainability concerns around palm oil, seasonal feedstock supply, rising environmental compliance costs, and price competition from petrochemical-based

products. Some commodity oleochemicals remain highly homogeneous, and profitability can be pressured when downstream demand slows or new capacity is released intensively. The bio-based label itself does not automatically create a strong price premium; value improvement is more likely in applications requiring traceability, low-carbon certification, high purity, or specific functionality. In the long term, the industry still has a solid growth foundation, but the market will become more segmented: commodity products will compete mainly on scale and cost, while higher-end derivatives will depend more on technology, certification, and customer integration.

This report is a detailed and comprehensive analysis for global Bio-based Oleochemicals market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global Bio-based Oleochemicals market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Bio-based Oleochemicals market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Bio-based Oleochemicals market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Bio-based Oleochemicals market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

#### The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Bio-based Oleochemicals

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Bio-based Oleochemicals market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Wilmar International, KLK OLEO, IOI Oleochemical, Musim Mas, P&G Chemicals, Oleon, Emery Oleochemicals, Ecogreen Oleochemicals, Cargill, VVF, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

## Market Segmentation

Bio-based Oleochemicals market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment by Type

Fatty Acids

Fatty Alcohols

Fatty Esters

Refined Glycerine

Others

### Market segment by Grade

Industrial Grade

Cosmetic Grade

Food Grade

Pharmaceutical Grade

Others

#### Market segment by Carbon Chain Length

Short-chain Oleochemicals (C6–C8)

Medium-chain Oleochemicals (C10–C14)

Long-chain Oleochemicals (C16–C18)

Others

#### Market segment by Application

Consumer Goods

Chemical Manufacturing

Industrial Manufacturing

Food and Nutrition

Pharmaceutical and Healthcare

Agriculture and Textile

Others

#### Major players covered

Wilmar International

KLK OLEO

IOI Oleochemical

Musim Mas

P&G Chemicals

Oleon

Emery Oleochemicals

Ecogreen Oleochemicals

Cargill

VVF

Godrej Chemicals

Kao Corporation

Arkema

Croda International

Evonik Industries

Nouryon

Teck Guan

Zanyu Technology Group

Jiangsu Feixiang Group

Yuanli Chemical

NOF Corporation

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Bio-based Oleochemicals product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Bio-based Oleochemicals, with price, sales quantity, revenue, and global market share of Bio-based Oleochemicals from 2021 to 2026.

Chapter 3, the Bio-based Oleochemicals competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Bio-based Oleochemicals breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales

quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Bio-based Oleochemicals market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Bio-based Oleochemicals.

Chapter 14 and 15, to describe Bio-based Oleochemicals sales channel, distributors, customers, research findings and conclusion.

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